Test Team

NEW LOOK

20062014

Creating Dashboards

Guide Title

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Introduction

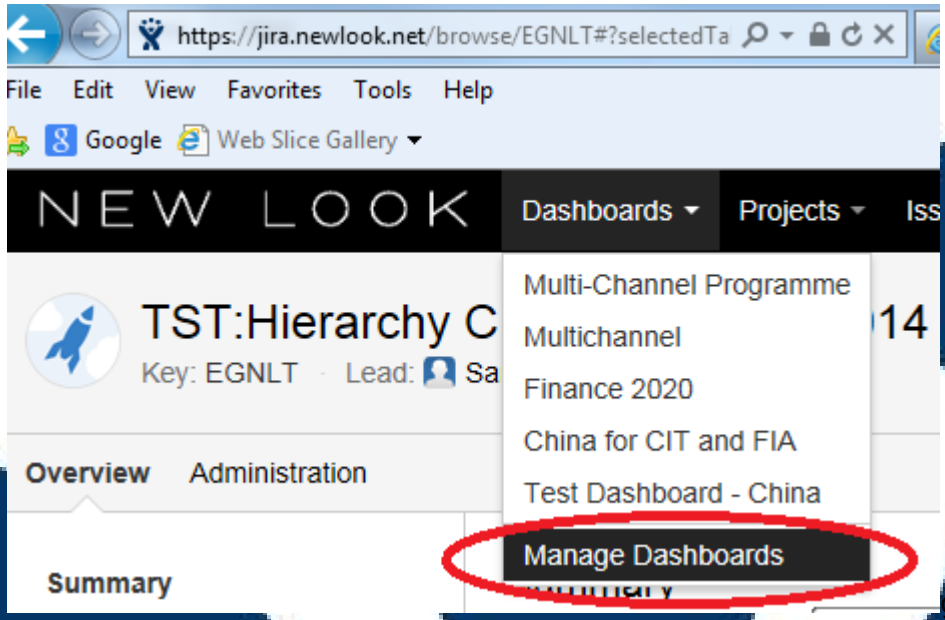
The JIRA Dashboard is the first screen you see when you log in to JIRA. This is a default dashboard.
It can be configured according to project requirements, to know the progress of the project.

Creating own dashboard

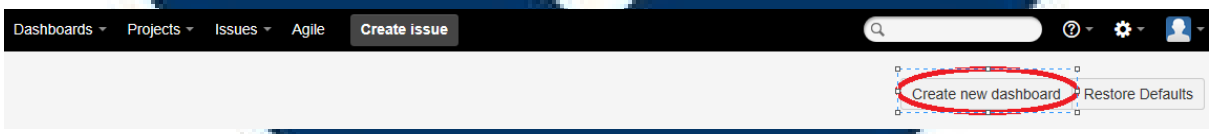
Pre-Requisite

Before creating dashboard, filter should be created. Refer Creating filters document for more details.

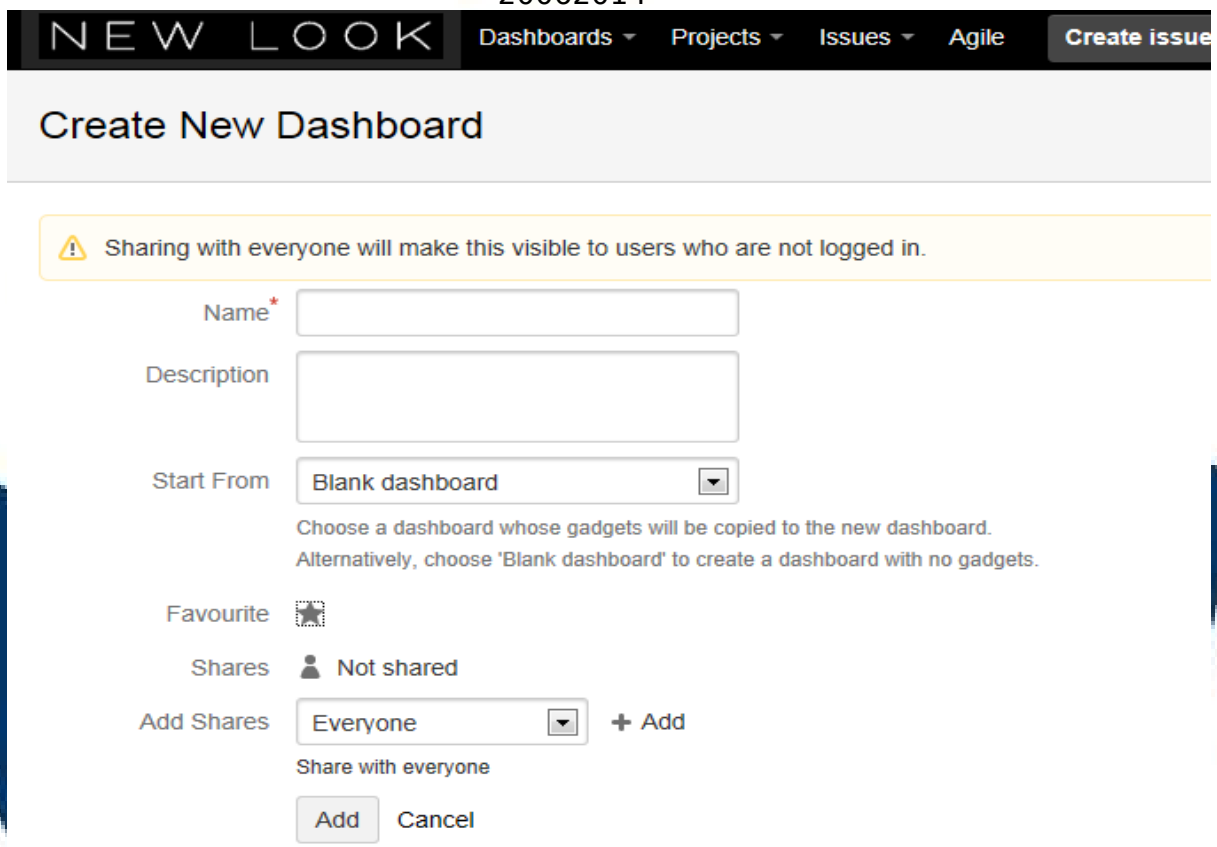
1 At the top left of the dashboard, click the **Dashboard** menu. Select **Manage Dashboards.**



2 Click on Create new dashboard

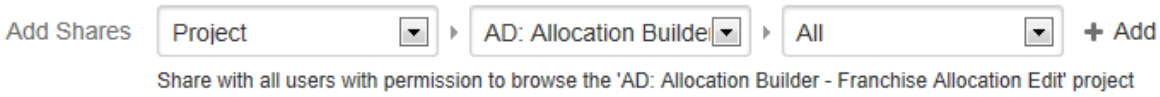


3 Create New Dashboard page will appear.

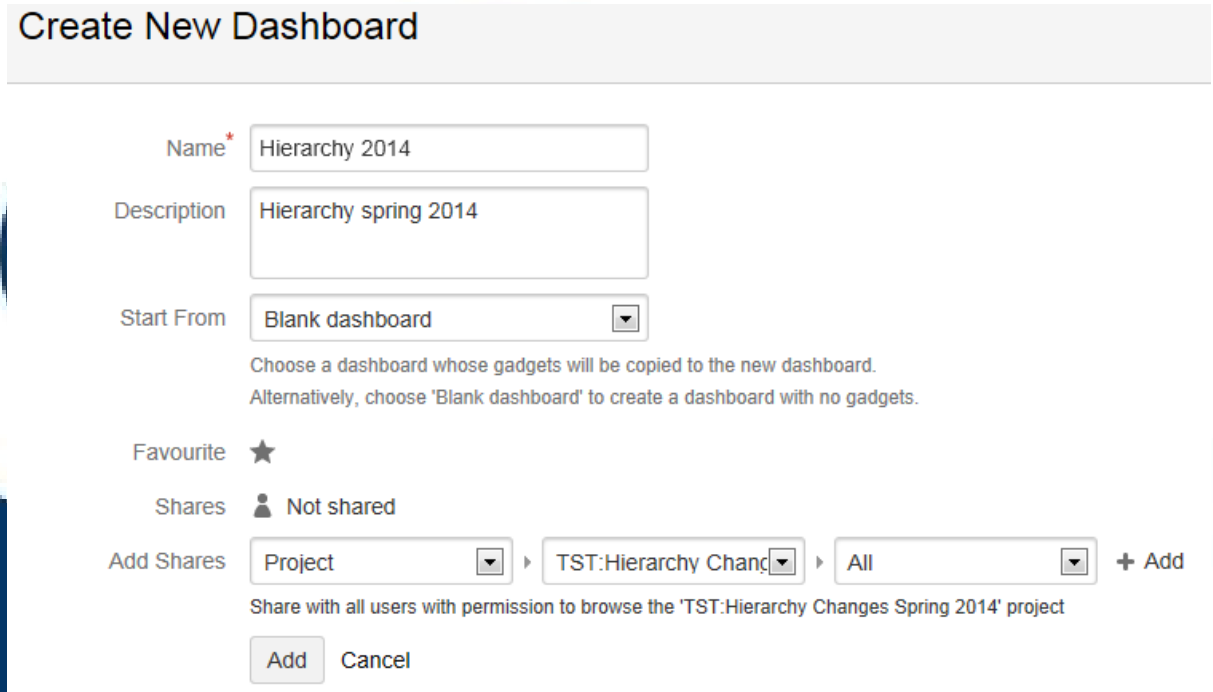


4 Enter the below information in Create New Dashboard page:

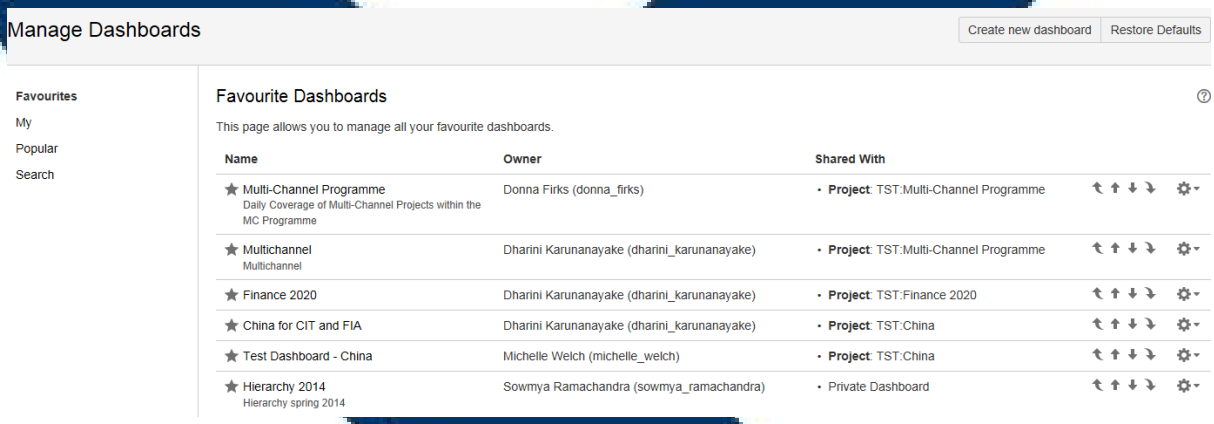
- Name
- Optional Description
- Start From option: Blank dashboard
- Favourite: Preferable to make your dashboard as favourite
- Add Shares dropdown: Select Project, later choose your project from the project dropdown


Add Shares
Project
AD: Allocation Builde
All
+ Add
Share with all users with permission to browse the 'AD: Allocation Builder - Franchise Allocation Edit' project

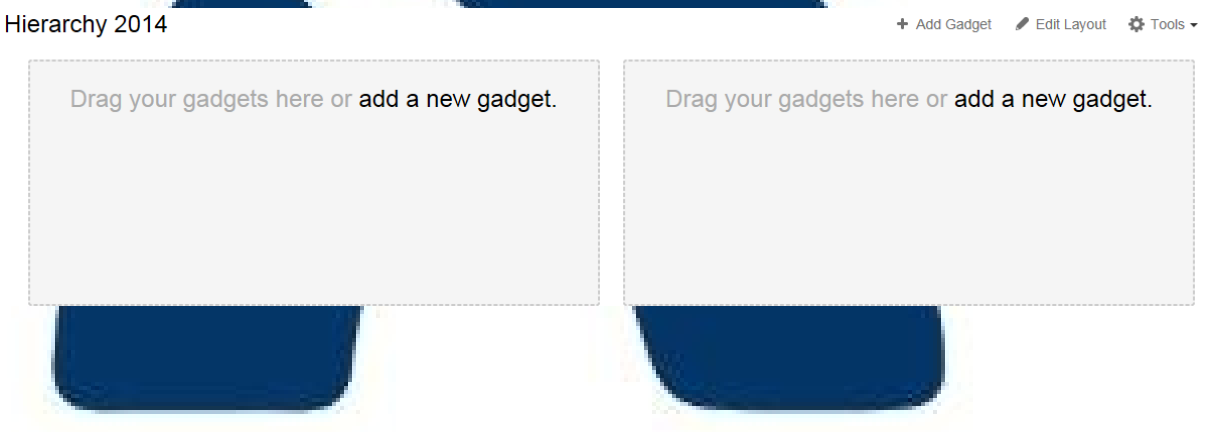
Click on Add button at the bottom of the Create New Dashboard page as shown below.



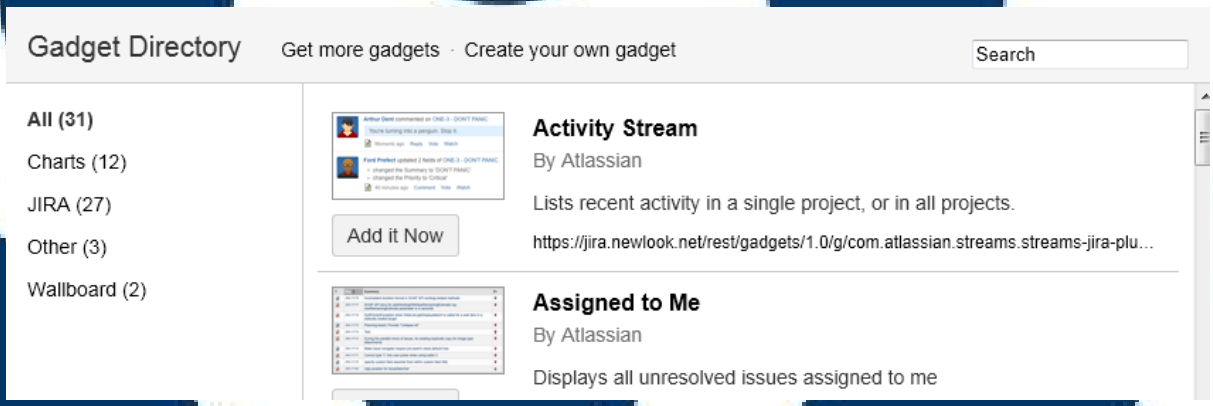
5 Your dashboard will now appear on Manage Dashboards screen under Favourite Dashboards as shown below:



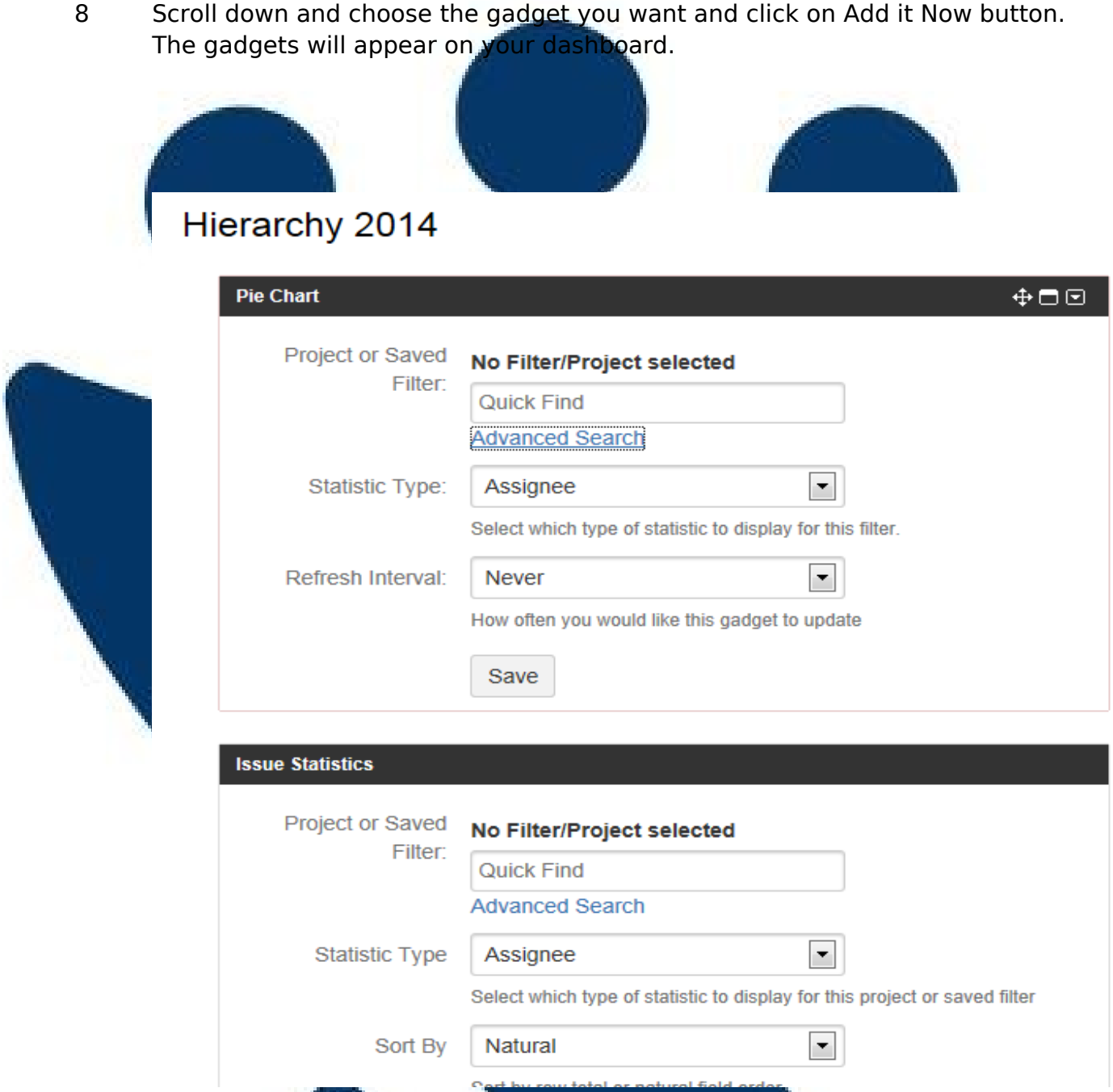
6 Now, click on your dashboard and you will be able to Add Gadgets and Edit Layout etc.


Hierarchy 2014
Add Gadget
Edit Layout
Tools
Drag your gadgets here or add a new gadget.
Drag your gadgets here or add a new gadget.

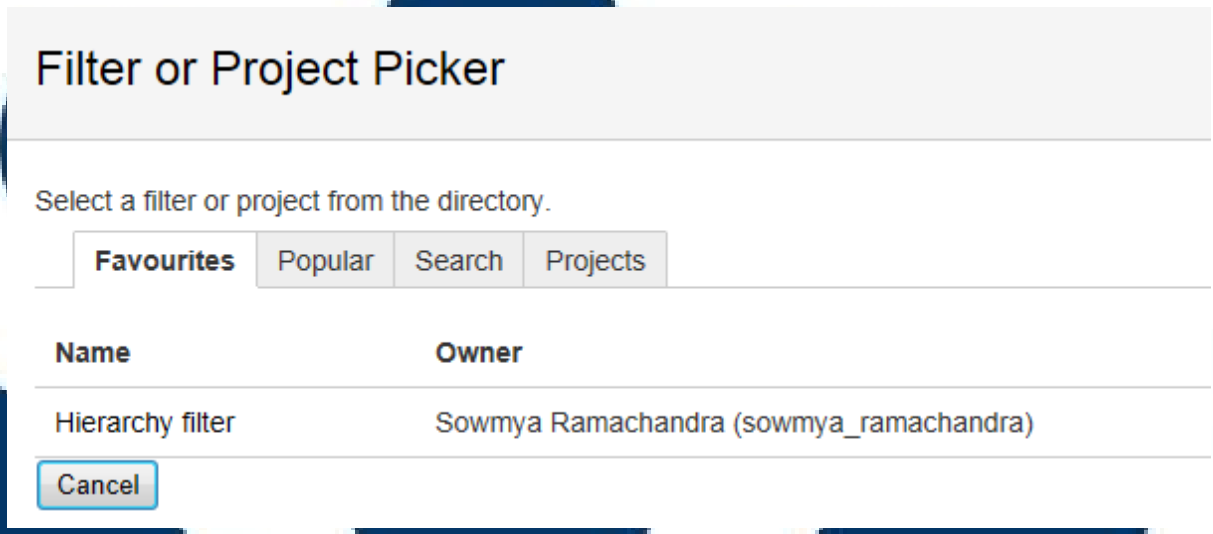
7 Click on Add a new gadget option, Gadget Directory will be shown as below:



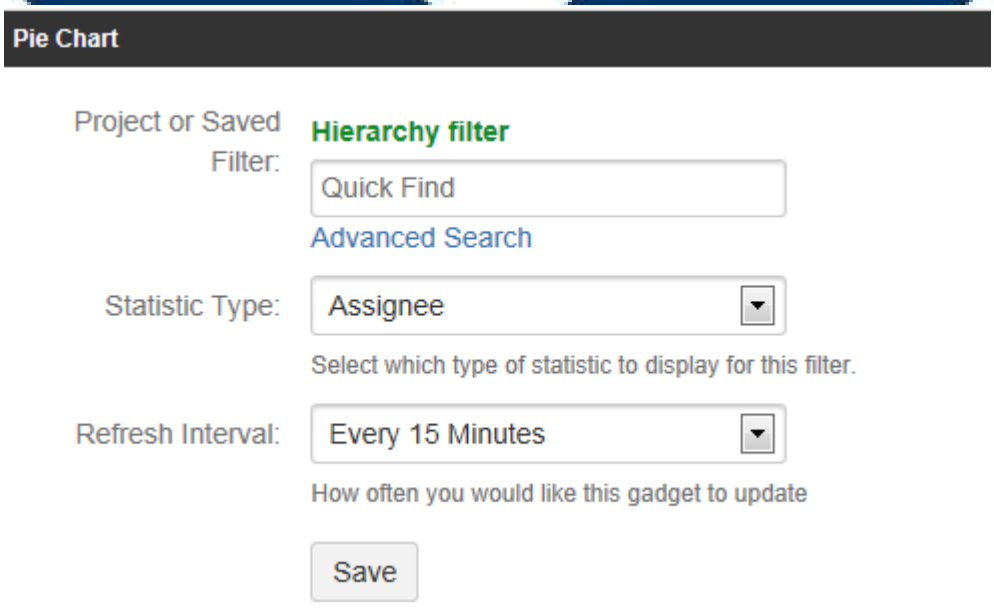
8 Scroll down and choose the gadget you want and click on Add it Now button. The gadgets will appear on your dashboard.



9 Under the Filter option on the gadget, click on **Advanced Search** and select the Filter that you have created from Filter or Project Picker page. Please refer to the creating filters document for more details on creating filters.



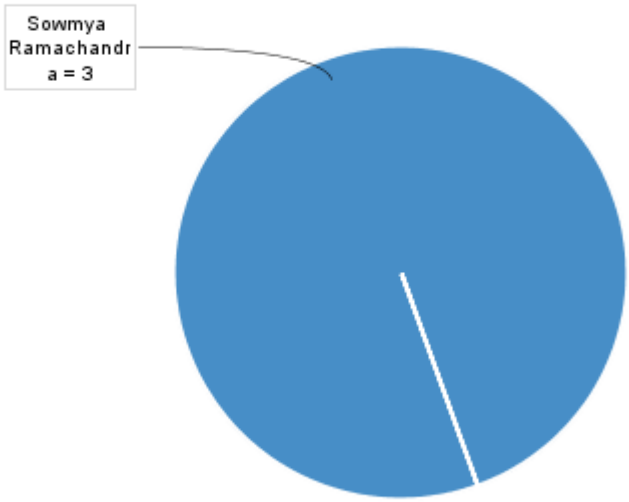
- Click on the Filter that has been created, the filter will appear on the Filter option.
- In the Stastic Type dropdown: select the Statistic type that you want in your dashboard.
- Refresh Interval dropdown: Select Every 15 minutes and later click on Save option.



Once the gadget options are saved, the gadget will appear on the dashboard as shown.

Hierarchy 2014

Pie Chart: Hierarchy filter



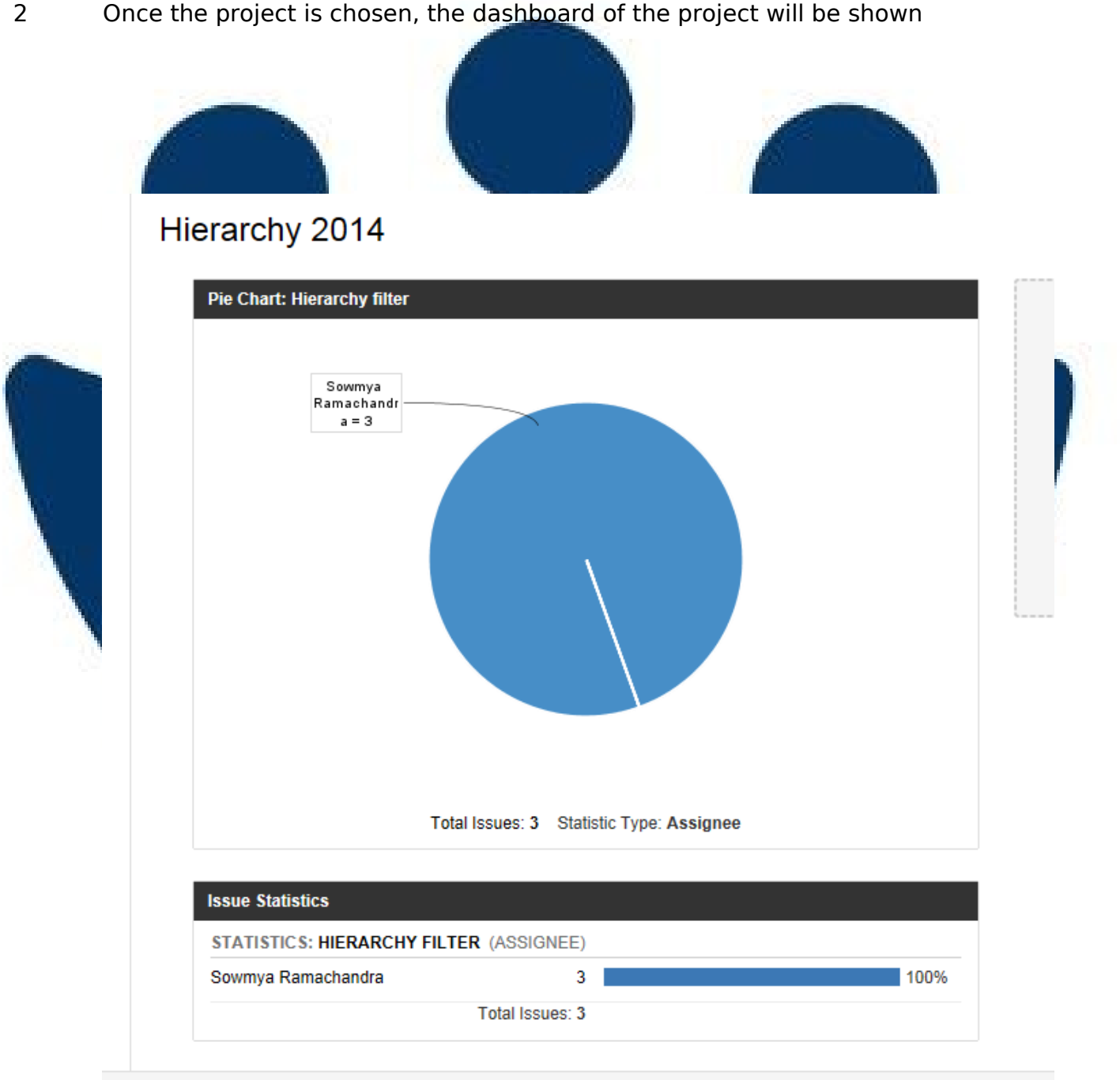
Total Issues: 3 Statistic Type: **Assignee**

Deleting the gadgets on dashboard

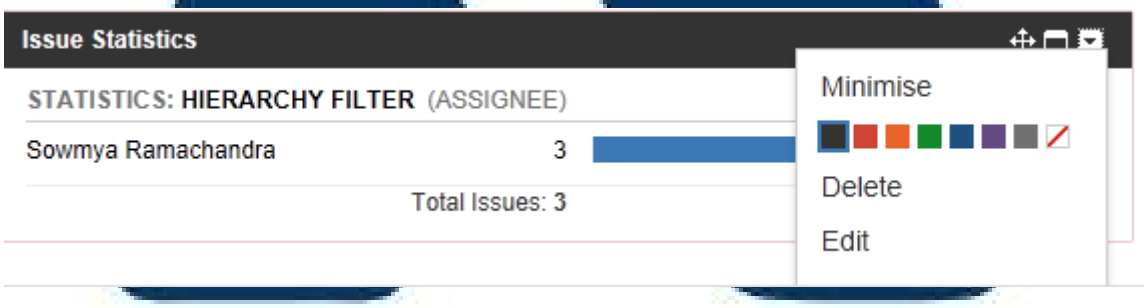
1. If you want to **remove** the gadgets from the dashboard, follow the below steps:

Click on Manage Dashboards, and after your Favourite Dashboard screen is shown, choose the project for which the dashboard has to be deleted.

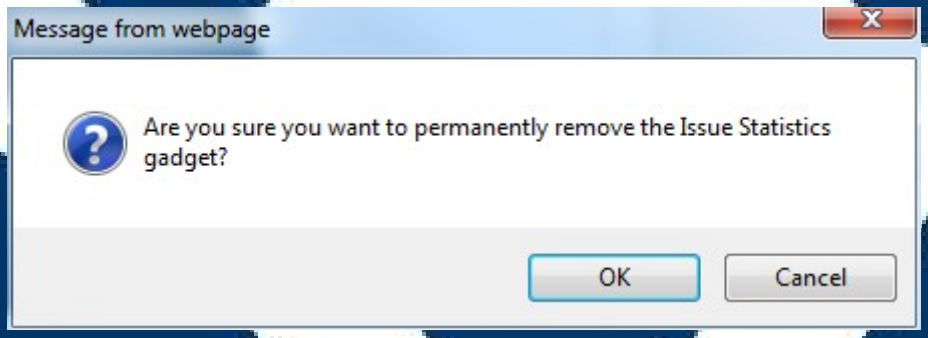
2 Once the project is chosen, the dashboard of the project will be shown



3 Click on button and the options to Delete, Edit will be shown



4 Click on Delete option, below message will be shown



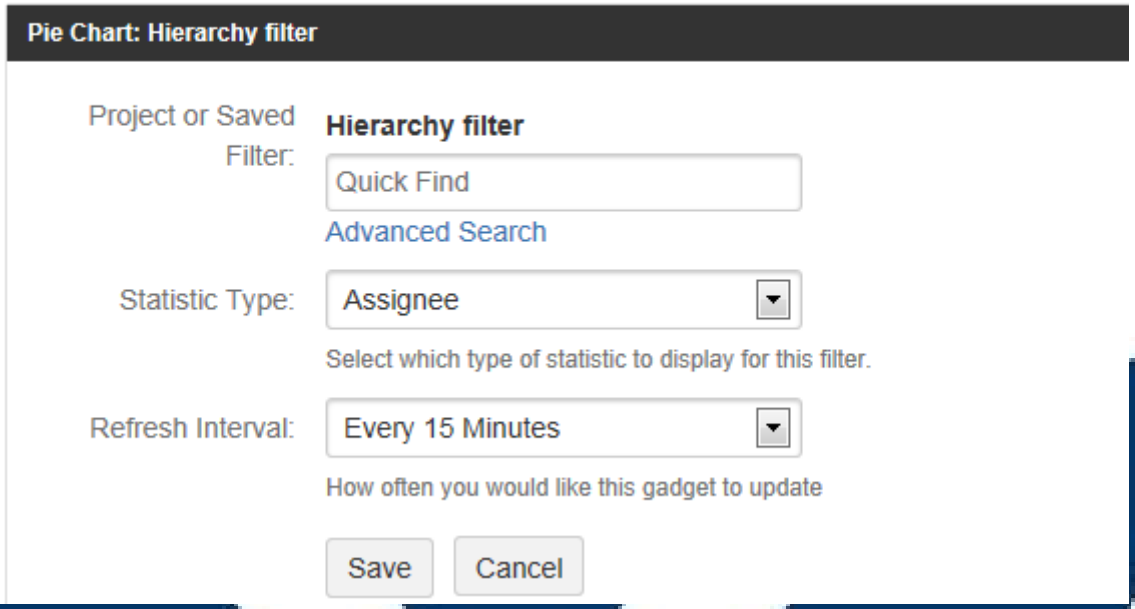
If you are sure to delete the dashboard, click on **OK** option. The dashboard gets deleted.

Editing the Dashboard

5. If you want to edit the dashboard, click on Edit option in Step 3, below screen will be shown, allowing to edit and click on Save button after editing. The changes made will be saved.

Note: You can only edit your own dashboards.

Hierarchy 2014

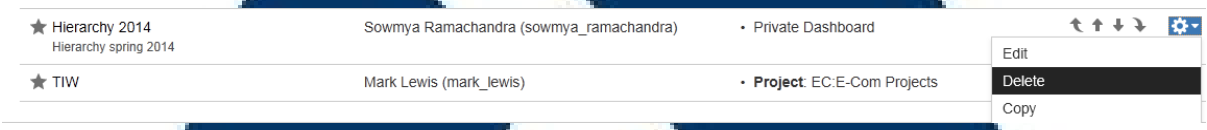


Deleting the Dashboard

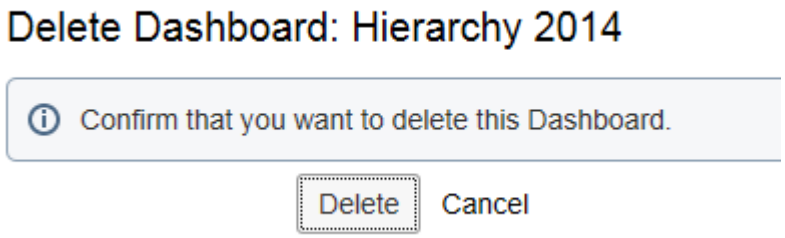
6. If you want to delete the dashboard, click on the Dashboards **>** Manage dashboards and choose your dash board which you want to delete.

   Note: You can only delete your own dashboards.

   Click on the ⚙ icon dropdown and choose delete option



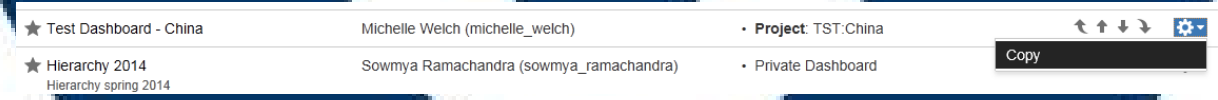
7. A confirmation page will open, if you want to delete the dashboard and click on Delete option



Copy Dashboard

8. If you want to delete the dashboard, click on the Dashboards **>** Manage dashboards and choose your dash board which you want to copy.

   Click on the icon dropdown and choose **copy** option



9. Create New Dashboard page will open; enter the details of the new dashboard you want and your new dashboard will appear in Favourite Dashboards list.